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**DOCUMENT CHECKLIST FOR OMBUDSMAN PROGRAM
MONITORING VISIT**

The Ombudsman Program shall provide the AAA staff member with the following documents during the monitoring visit:

- ☐ Organizational Chart
- ☐ Current Budget for the Ombudsman Program
- ☐ Roster of Ombudsman Program Staff
- ☐ Job Descriptions for Ombudsman Program Staff
- ☐ Conflict of Interest Policy
- ☐ Employee Grievance Procedure
- ☐ Consumer Grievance Procedure
- ☐ Memorandum of Understanding with Legal Services Provider
- ☐ Minutes from the last two Ombudsman Advisory Council and/or Board of Directors meetings, if applicable
- ☐ Roster of Current Ombudsman Advisory Council and/or Board of Directors, if applicable
- ☐ List of Training Sessions and Subjects for Ombudsmen for the last 12 months
- ☐ Customer Satisfaction Survey – sample and results, if applicable
- ☐ Completed Core Elements Self-Assessment Tool, if applicable
- ☐ Copies of Ombudsman Program publications, brochures, etc.
- ☐ Random Sample of Five Staff and/or Volunteer Conflict of Interest Statements